

IN THE CLAIMS

1. (currently amended) A method performed by a computer for ~~generating~~ developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said method comprising the steps of:

displaying a plurality of pre-defined integration events based upon at least one user selected integration area, each pre-defined integration event being displayed in association with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

displaying a detailed explanation for each pre-defined integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration;

receiving at least one user selection of a pre-defined integration event for each user selected integration area;

displaying the user selected, pre-defined integration events for each user selected integration area;

displaying at least one of a name of a person responsible, a due date, a completion percentage, and a commentary for each user selected, pre-defined integration event; and

storing the user selected, pre-defined integration events and at least one of the name of a person responsible, the due date, the completion percentage, and the commentary for

each user selected, pre-defined integration event into corresponding integration areas, as an acquisition integration project plan.

2. (canceled)
3. (original) A method according to Claim 1 further comprising the steps of:  
  
receiving user defined integration events for the integration project;  
  
displaying user defined integration events for the integration project; and  
  
storing the user defined integration events within the acquisition integration project plan.
4. (original) A method according to Claim 3 wherein said step of storing the user defined integration events comprises the step of storing the user defined integration events as corresponding to at least one user defined integration area.
5. (original) A method according to Claim 4 further comprising the step of forwarding the user defined integration areas and user defined integration events to a system administrator for inclusion into the pre-defined integration areas and pre-defined integration events.
6. (original) A method according to Claim 1 wherein the acquisition integration project plan is stored in at least one of a spreadsheet format and a web page format.
7. (previously presented) A method according to Claim 1 wherein the step of displaying a detailed explanation for each pre-defined integration event further comprises enabling a user to update the advice for performing an integration event and the at least one sample presentation relating to the integration event during an acquisition process.
8. (original) A method according to Claim 1 further comprising the step of displaying a deliverable checklist for each integration event.
9. (currently amended) A computer for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing

information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said computer programmed to:

display a plurality of pre-defined integration events based upon at least one user selected integration area, each pre-defined integration event being associated with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

display a detailed explanation for each pre-defined integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration;

display at least one user selected, pre-defined integration event for each user selected integration area;

display at least one of a name of a person responsible, a due date, a completion percentage, and a commentary for each user selected, pre-defined integration event; and

store the user selected, pre-defined integration events and corresponding integration areas as an acquisition integration project plan.

10. (original) A computer according to Claim 9 further programmed to:

display user defined integration events for the integration project; and

store the user defined integration events within the acquisition integration project plan.

11. (original) A computer according to Claim 10 further programmed to store the user defined integration events as corresponding to at least one user defined integration area.

12. (original) A computer according to Claim 11 further programmed to forward the user defined integration areas and user defined integration events to a system administrator for inclusion into the pre-defined integration areas and pre-defined integration events.

13. (original) A computer according to Claim 9 further programmed to store the acquisition integration project plan in at least one of a spreadsheet format and a web page format.

14. (previously presented) A computer according to Claim 9 further programmed to enable a user to update the advice for performing an integration event and the at least one sample presentation relating to the integration event during an acquisition process.

15. (original) A computer according to Claim 9 further programmed to display a deliverable checklist for each integration event.

16. (currently amended) A database for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, the database ~~acquisition integration~~ comprising:

data corresponding to at least one integration area;

data corresponding to integration events for each integration area, each integration event is associated with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase; and

data corresponding to a detailed explanation of each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based

on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration.

17. (previously presented) A database according to Claim 16 further comprising data corresponding to enabling a user to update the advice for performing an integration event and the at least one sample presentation relating to the integration event during an acquisition process.

18. (canceled)

19. (original) A database according to Claim 16 further comprising data corresponding to an overview of acquisition integration.

20. (original) A database according to Claim 16 further comprising data corresponding to feedback received from users.

21. (original) A database according to Claim 16 further comprising data corresponding to a deliverables checklist for at least one integration area.

22. (original) A database according to Claim 16 wherein said data corresponding to integration events is sorted under data corresponding to headings of pre-due diligence, due diligence, post sign/pre-close, post close, and transition to operations.

23. (original) A database according to Claim 16 further comprising data corresponding to at least one of a name of a person responsible for an integration event, a completion percentage, a due date, and a commentary for each integration event.

24. (currently amended) A system for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio acquisition integration, said system comprising:

a client system comprising a browser;

a database comprising data corresponding to integration events for at least one integration area wherein each integration event is associated with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase, and said database further comprising data corresponding to a detailed explanation of each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration; and

a server configured to be coupled to said client system and said database, said server further configured to:

~~prompt a user to select an integration area and to provide information regarding a status of integration events within the integration area.~~

receive at least one user selection of an integration event for each user selected integration area;

display on said client system the selected integration events for each selected integration area;

display on said client system at least one of a name of a person responsible, a due date, a completion percentage, and a commentary for each selected integration event; and

store in the database the selected integration events and at least one of the name of a person responsible, the due date, the completion percentage, and the commentary for each selected integration event into corresponding integration areas, as an acquisition integration project plan.

25. (original) A system according to Claim 24 wherein said database further comprises data corresponding to at least one of a name of a person responsible, a completion percentage, a due date, and a commentary for each integration event.

26. (previously presented) A system according to Claim 24 wherein said database further comprises data corresponding to an overview of acquisition integration, and feedback received from users.

27. (original) A system according to Claim 24 wherein said database further comprises data corresponding to at least one of a deliverables checklist for each integration area and headings for integration events within an integration area of at least one of pre-due diligence, due diligence, post sign/pre-close, post close, and transition to operations.

28. (currently amended) A system according to Claim 24 wherein said server is configured to cause a screen listing a plurality of integration areas to be displayed at a the client computer system.

29. (currently amended) A system according to Claim 28 wherein for an integration area, said server is configured to cause said client computer system to display a plurality of integration events for the integration area.

30. (original) A system according to Claim 29 wherein the integration events are sorted under headings comprising pre-due diligence, due diligence, post sign/pre-close, post close, and transition to operations.

31. (original) A system according to Claim 24 wherein said server is configured to cause a screen listing a plurality of deliverables checklists for an integration area.<sup>32</sup>  
(currently amended) A method for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, acquisition integration planning, said method comprising the steps of:



displaying on an electronic interface a plurality of integration areas having a plurality of integration events, each integration event being displayed in association with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

selecting, from ~~an~~ the electronic interface, at least one of a the plurality of integration areas;

identifying, from the electronic interface, a responsible person responsible for each integration area;

identifying, from the electronic interface, at least one of a person responsible and a due date for each integration event within an integration area;

requesting, from the electronic interface, a percentage completion for each integration event; and

requesting, from the electronic interface, a detailed explanation for an integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining the percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, ~~and the at least one sample presentation are~~ includes an attached file including data previously presented by the acquiring entity as part of a based-on prior acquisition processes integration.

33. (original) A method according to Claim 32 wherein the integration areas comprise at least one of business leader, integration manager, due diligence leader, sales/marketing, sourcing, customer services, collections, manufacturing, engineering, environmental health and safety, services, risk management, six sigma, information technology, communication, human resources strategy, human resources labor relations, human resources employee benefits, human resources compensation, controllership, legal,



intellectual property, treasury, Euro program, financial planning, closing reporting, tax integration, and insurance.

34. (previously presented) A method according to Claim 32 further comprising the step of using the electronic interface to update the advice for performing an integration event and the at least one sample presentation relating to the integration event during an acquisition process.

35. (original) A method according to Claim 32 further comprising the step of attaching to an integration event, using the electronic interface, at least one sample presentation.

36. (original) A method according to Claim 32 further comprising the step of requesting, from the electronic interface, a deliverables checklist for an integration area.

37. (original) A method according to Claim 32 further comprising the step of entering, into the electronic interface, comments regarding an acquisition integration.

38. (currently amended) Apparatus for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said apparatus comprising:

means for prompting a user to select at least one integration area;

means for displaying a plurality of integration events for the selected integration areas, each integration event being displayed in association with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

means for displaying a detailed explanation for each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based

on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration; and

means for ~~generating~~ developing an integration acquisition project plan using selected integration events.

39. (original) Apparatus according to Claim 38 further comprising means for displaying a plurality of sub-events for an integration event.

40. (original) Apparatus according to Claim 38 further comprising means for displaying a name of a person responsible for each integration area.

41. (original) Apparatus according to Claim 38 further comprising means for displaying an explanation for a selected integration event.

42. (original) Apparatus according to Claim 38 further comprising means for displaying sample presentations from other integration projects.

43. (original) Apparatus according to Claim 42 wherein the sample presentations are files stored within said apparatus.

44. (currently amended) A computer program embodied on a computer readable medium for managing acquisition integration to achieve acquisition synergies, customer satisfaction and operational excellence, acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said computer program comprising a code segment that:

manages integration areas for acquisition integration;

organizes integration events for each integration area, each integration event associated with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

displays a detailed explanation for each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation are includes an attached file including data previously presented by the acquiring entity as part of a based on prior acquisition processes integration; and

~~generates~~ develops an acquisition integration plan including a set of integration events and deliverable checklists based on user selected integration areas, to guide the user through integration process.

45. (original) A computer program according to Claim 44 further comprising a code segment that allows the user to enter names of persons responsible, percentage completions, due dates, and comments for each integration event.

46. (original) A computer program according to Claim 44 further comprising a code segment that manages records pertaining to explanations for each integration event.

47. (original) A computer program according to Claim 44 further comprising a code segment that manages records pertaining to sample presentations for at least one integration event.

48. (original) A computer program according to Claim 44 further comprising a code segment that manages records pertaining to an overview of acquisition integration.

49. (original) A computer program according to Claim 44 further comprising a code segment that manages records pertaining to feedback received from users.

50. (original) A computer program according to Claim 44 further comprising a code segment that manages records pertaining to a deliverables checklist for at least one integration area.

51. (original) A computer program according to Claim 44 wherein the network is a wide area network operable using a protocol including at least one of TCP/IP and IPX.

52. (original) A computer program according to Claim 44 wherein the data is received from the user via a graphical user interface.

53. (original) A computer program according to Claim 44 further comprising a code segment that generates acquisition integration plan based on pre-stored assumptions in the database.

54. (original) A computer program according to Claim 44 further comprising a code segment that displays information through an HTML document downloaded by the server system.

55. (original) A computer program according to Claim 44 further comprising a code segment that:

accesses the centralized database;

searches the database regarding the specific inquiry;

retrieves information from the database; and

causes the retrieved information to be displayed on the client system.

56. (original) A computer program according to Claim 44 wherein the client system and the server system are connected via a network and wherein the network is one of a wide area network, a local area network, an intranet and the Internet.

57. (original) A computer program according to Claim 44 further comprising a code segment that monitors the security of the system by restricting access to unauthorized individuals.

58. (currently amended) A method for operating a computer to develop an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the

acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said method comprising the steps of:

prompting a user to select an integration area from an acquisition integration main user interface;

displaying a set of selectable integration events for the selected integration area, each integration event being displayed in association with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

displaying a detailed explanation for each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation ~~are~~ includes an attached file including data previously presented by the acquiring entity as part of a based-on prior acquisition processes integration; and

~~generating~~ developing an acquisition integration project plan incorporating selected integration events.

59. (original) A method according to Claim 58 wherein the acquisition integration project plan further incorporates integration sub-events for one or integration events.

60. (original) A method according to Claim 58 further comprising the step of displaying a name of a person responsible for the selected integration area.

61. (original) A method according to Claim 58 wherein said step of displaying a set of selectable integration events further comprises the step of providing a user interface which includes an explanation for a selected integration event.

62. (original) A method according to Claim 61 wherein the explanation for a selected integration event comprises sample presentations from other acquisition integration projects.

63. (original) A method according to Claim 62 wherein the sample presentations are files stored within the computer.

64. (original) A method according to Claim 58 wherein each selectable integration event is displayed under at least one of a plurality of headings, the headings comprising at least one of pre-due diligence, due diligence, post sign/pre-close, post close, and transition to operations.

65. (original) A method according to Claim 58 wherein said step of prompting a user to select an integration area comprises the step of displaying an integration area list which comprises at least one of business leader, integration manager, due diligence leader, sales/marketing, E-commerce, customer services, collections, manufacturing, engineering, logistics, environmental health and safety, services, risk management, six sigma, information technology, communication, culture, human resources (HR) strategy, HR labor relations, HR employee benefits, HR compensation, HR employment practices, payroll benefits, expatriate administration, travel and living expenses, legal, intellectual property, compliance, treasury, Euro program, financial planning, closing reporting, tax integration, controllership and insurance.

66. (currently amended) A computer for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said computer programmed to:

prompt a user to select an integration area from a computer generated screen configured as an acquisition integration main user interface;

display a set of selectable integration events for the selected integration area, each integration event being displayed in association with a phase in an acquisition process

including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

display a detailed explanation for each integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event, and the at least one sample presentation ~~are~~ includes an attached file including data previously presented by the acquiring entity as part of a based-on prior acquisition processes integration; and

~~generate~~ develop an acquisition integration project plan incorporating user selected integration events.

67. (original) A computer according to Claim 66 further programmed to incorporate integration sub-events for one or more of the integration events within the integration project plan.

68. (original) A computer according to Claim 66 wherein for an integration area, said computer displays a computer generated screen with a name of a person responsible for the selected integration area.

69. (original) A computer according to Claim 66 wherein for a selected integration event, said computer is programmed to display a computer generated screen providing the user with an explanation of the selected integration event.

70. (original) A computer according to Claim 69 wherein the explanation for an integration event comprises sample presentations from other integration projects.

71. (original) A computer according to Claim 70 wherein said sample presentations are files stored within said computer.

72. (original) A computer according to Claim 66 wherein to display selectable integration events, said computer displays a computer generated screen listing the selectable



integration events under headings comprising at least one of pre-due diligence, due diligence, post sign/pre-close, post close, and transition to operations.

73. (original) A computer according to Claim 66 configured with an integration area list which comprises at least one of business leader, integration manager, due diligence leader, sales/marketing, E-commerce, customer services, collections, manufacturing, engineering, logistics, environmental health and safety, services, risk management, six sigma, information technology, communication, culture, human resources (HR) strategy, HR labor relations, HR employee benefits, HR compensation, HR employment practices, payroll benefits, expatriate administration, travel and living expenses, legal, intellectual property, compliance, treasury, Euro program, financial planning, closing reporting, tax integration, controllership and insurance.

74. (currently amended) A computer-readable medium for developing an acquisition integration project plan outlining at least one process for performing an acquisition integration and providing information to perform the acquisition integration, the acquisition integration including assimilating an acquiring entity with at least one of a newly acquired company and a newly acquired asset including a portfolio, said computer-readable medium executable by a computer for controlling the computer to:

receive user selections of pre-defined integration areas;

receive user selections of pre-defined integration events for the selected integration areas, each integration event is associated with a phase in an acquisition process including a pre-due diligence phase, a due diligence phase, a post sign/pre-close phase, a post close phase, and a transition to operations phase;

display a detailed explanation for each selected pre-defined integration event including a description of the integration event, advice for performing the integration event, and at least one sample presentation relating to the integration event, the description facilitates determining a percentage of completion of the integration event, wherein the advice is based on prior acquisition integrations and provides guidance to a person responsible for performing the integration event on how to accomplish the integration event,

~~and~~ the at least one sample presentation ~~are~~ includes an attached file including data previously presented by the acquiring entity as part of a based-on prior acquisition processes integration; and

~~generate~~ develop an acquisition integration plan with the user selected, pre-defined integration areas and integration events for a planned acquisition.

75. (original) A computer-readable medium according to Claim 74 wherein the computer is further controlled to:

receive user defined integration areas and user defined integration events; and

incorporate the user defined integration areas and user defined integration events into the generated acquisition integration plan.

76. (original) A computer-readable medium according to Claim 74 wherein the computer is further controlled to display the generated acquisition integration plan in at least one of a spreadsheet format and a web page format.

77. (original) A computer-readable medium according to Claim 74 wherein the computer is further controlled to store user feedback on said medium.

78. (original) A computer-readable medium according to Claim 74 wherein the computer is further controlled to:

group integration events for at least one integration area under headings of at least one of pre-due diligence, due diligence, post sign/pre-close, post close and transition to operations; and

receive a completion percentage for each heading for each integration area.

79. (original) A computer-readable medium according to Claim 78 wherein the computer further controlled to display the completion percentages for all integration areas within an acquisition integration project plan in a spreadsheet format.